MEMORANDUM

DATE: September 18, 2008

TO: Presidents

FROM: Richard P. West
Executive Vice Chancellor/Chief Financial Officer


This memorandum transmits the schedule of submissions for the capital outlay program and related material for program development for 2010/11. Both major and minor capital outlay project submittals are requested. Minor capital outlay projects are those estimated to cost $400,000 or less, while projects estimated to cost greater than $400,000 are required to follow the major capital outlay submittal process outlined in the attachments.

In developing the 2010/11 capital program, support documentation forms have been modified to facilitate budget development for sustainable buildings, renewable energy generation, and off-site environmental mitigation. This is in response to the requirements of enacted legislation AB 32, and the California Supreme Court ruling in the City of Marina v. Trustees. AB 32, the California Global Warming Solutions Act, aims to reduce greenhouse gas emissions to 1990 levels; it is appropriate for budget requests to include a renewable energy generation component to help the CSU achieve the intent of the legislation. With regard to the Marina case, campuses need to identify the off-site mitigation measures that may be necessary as a result of the proposed project so that we can consider this cost and budget accordingly.

In support of sustainable building design, whether the measurement be the LEED rating system or the CSU’s Program for Environmental Responsibility, campuses will not only consider the building’s architecture and engineering, but also other elements to address user needs and reduce environmental impacts. These may include storm water and sewer management, accessible paths of travel, vehicle trip reduction, etc. Procedures that support an integrated building design have been developed at the budget stage to help fund concepts that were not normally included in the historical cost per square foot.
for a building. With ever changing technologies, staff will work with campuses to budget for these new components in order to present to Department of Finance a rational approach to sustainable building design.

For the purposes of the draft program, campuses are directed to use the multiyear enrollment projections that were finalized earlier this year for the CSU report to the State. A separate memorandum from EVC and CAO Gary W. Reichard and AVC Marsha Hirano-Nakanishi will transmit the institutional projections and provide guidance to you and the institution’s Enrollment Planning & Resource (EP&R) officer to disaggregate the projections into academic, enrollment, and capital planning estimates. The multiyear enrollment projections are used to ensure that the capital program is consistent with the campus academic plan.

**State Funded Capital Outlay Program**

The 2010/11 state program is reliant upon funding from either a new two year general obligation bond anticipated for a November 2010 ballot initiative, or legislative approval of the use of lease revenue bonds. Recognizing our growth needs and our backlog of projects, the governor’s strategic plan calls for an increase from the Higher Education Compact’s previous funding of $345 million per year to $395 million per year past 2008-09 so that we can accommodate approximately 80,000 new students during the next ten years. The CSU is thus seeking support for $400 million for 2010/11 to include funding for sustainable buildings and construction cost escalation. For planning purposes, campuses are requested to complete their CPDC 2-7 project cost estimate and schedule in anticipation that funding will be available for projects in January 2011, assuming a successful bond initiative by November 2010. Initial budget requests should use the Construction Manager at Risk delivery method to improve budgeting for these projects.

Attachment 5 provides the categories and criteria to be used for the 2010/11 – 2014/15 Capital Improvement Program, as approved by the trustees at their July 2008 meeting. Opportunities to secure energy efficiency co-funding will continue in order to leverage state funding in support of the trustees’ efficiency goals and AB 32 to minimize the campus’ carbon footprint.

The California State University submittals to the Department of Finance (DOF) are required to have complete project descriptions and program justifications for projects proposed for the 2010/11 budget year. Less detailed “Concept Paper” budget proposals are required for projects in years two through five, to enable CPDC to categorize those projects in the CSU five-year plan and understand campus priorities. Campus requests for the systemwide Capital Renewal Program are to follow the deadlines noted for the major capital outlay program submittals, including the identification of specific projects totaling approximately $1.5 to $2 million in each of the five program years.

It is the intent of the Legislature that the California State University justify requests for capital outlay funding for classroom space and laboratory space by using legislatively approved utilization standards and a reasonable assumption of summer term enrollment. Therefore, CSU bases its five-year capital outlay plan on utilization of instructional facilities during the summer, assuming a summer term enrollment of 25 percent to 40 percent of fall/winter/spring enrollment at rural and urban campuses, respectively.

The enclosed 2010/11 cost guide includes a 5 percent California Construction Cost Index escalation based on the current DOF projections. Establishing appropriate funding levels ensures our commitment to capital development program priorities that include extending the life cycle of key building systems, implementing sustainable design and improving efficiency and operation of mechanical systems. Campuses are requested to involve their selected/assigned Seismic Review Board and Mechanical Review Board members in the review and completion of project feasibility studies during the conceptual scope and budget development stage.
Non-State Funded Capital Outlay Program

Please note that the following attachments and submittal deadlines also pertain to the program for Non-State Capital Outlay projects. Campuses are requested to consider the impact of non-state project financing on their debt capacity limitations as noted in Executive Order Number 994. Draft Financial plans for non-state projects, for the 2010/11 action year only, should be submitted to Financing and Treasury by October 31, 2008 and fully approved by that office no later than March 30, 2009. Timely and accurate submittal of non-state projects will enable CSU to forecast and manage future financing needs, therefore amendments to the Non-State Capital Outlay program should be kept to a minimum.

Minor Capital Outlay and Energy Projects

Projects must be submitted in priority order using the form CPDC 2-30 or CPDC 2-32 for Energy, including project type categories and project schedule information in the appropriate columns. Funding levels for 2008/09 and 2009/10 have been forwarded to the campuses and are available from your University Planner to enable campus planning for the 2010/11 program. We recommend campuses consider various project delivery methods and leverage utility incentive funds where feasible. The DOF project type categories are:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADA2</td>
<td>Americans with Disabilities Act (ADA) compliance</td>
</tr>
<tr>
<td>CD</td>
<td>Code deficiencies. Noncritical fire/life safety projects, and all other code deficiencies except (ADA)</td>
</tr>
<tr>
<td>CRI</td>
<td>Critical infrastructure deficiencies that impair program delivery (i.e., replacement of aging mechanical systems)</td>
</tr>
<tr>
<td>ECON</td>
<td>Projects justified primarily by economic impacts (i.e., savings, cost avoidance, or revenue generation)</td>
</tr>
<tr>
<td>SC</td>
<td>Security</td>
</tr>
<tr>
<td>WRK</td>
<td>Workload-driven projects. These are projects for existing programs resulting from workload changes (i.e. non-policy) (This category will apply to most campus projects)</td>
</tr>
<tr>
<td>ENGY</td>
<td>Energy/Utility conservation projects. This is a category added for CSU use only.</td>
</tr>
</tbody>
</table>

The "New Space/Capacity Space Change Request" (form CPDC 2-31) should be completed if a proposed project is adding new space or changing the use of existing space.

Architectural barrier removal projects related to the Americans with Disability Act (ADA) should be included in your submission targeting 20 percent of the minor capital outlay allocation.

Campuses are requested to submit minor capital outlay energy and utility conservation projects costing $400,000 or less (inclusive of any rebates, grants or incentive funds that will be used to buy down the project). If incentive funds are secured, the impact of such funding will be considered when calculating the amount to be allocated to the campus. The CSU proposal form (CPDC 2-32E) will be used for additional partnership incentive funds. Energy, utility and planning information crucial to these projects are included on this form.

Attachments

Included with this call letter are:

Attachment 1: Schedule of Submissions
Attachment 2: Guidelines for Feasibility Studies
Attachment 3: Cost Guide for State and Non-State Buildings
Attachment 4: Capital Program Submittals and Accessing Electronic Forms
Attachment 5: Categories and Criteria for the 2010/11 – 2014/15 Program
Questions regarding the state-funded submissions should be directed to Mr. Larry Piper, Chief of Facilities Planning, Capital Planning, Design and Construction, (562) 951-4106. Please contact Mr. Robert Eaton, Director, Financing and Treasury (562) 951-4572, with questions pertaining to the financial documentation required to support non-state funded submissions, and Mr. Len Pettis, Chief of Plant, Energy, and Utilities (562) 951-4122 with questions regarding energy related issues.

We thank you and your staff for the excellent work you do in conjunction with the preparation of the annual capital outlay programs. The success of these programs is a direct result of the quality and timeliness of the campus submittals in response to the annual program development schedule.

Please submit all documents to Ms. Elvyra F. San Juan, Assistant Vice Chancellor, Capital Planning, Design and Construction.

RPWjdes

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Housing Directors
Student Union Directors
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Building Coordinators
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Mr. Stan Hiuga
Mr. Mark Whitaker
Dr. Charles B. Reed
Dr. Gary Reichard
Ms. Karen Zamarripa
Ms. Colleen Nickles
Mr. Robert Turnage
Mr. Robert Eaton
F&T Managers
Ms. Elvyra F. San Juan
CPDC Managers
SCHEDULE OF SUBMISSIONS & CALENDAR OF CAPITAL OUTLAY PROCESS

July 15, 2008  Board of Trustees approved proposed Categories and Criteria.

October 31, 2008  State: Campuses submit Draft Capital Improvement (CIP) and Draft Capital Outlay Budget Change Proposals (COBCPs) (two paper copies and one electronic copy) including feasibility studies and equipment lists.

October 31, 2008  Non-State: Campuses submit (two paper copies and one electronic copy) funding source and preliminary ten-year financial plan showing operating budgets supporting the financing costs for 2010/11 non-state projects to Financing and Treasury. The campus coordinates with F&T staff to revise the financial plan accordingly in order to receive F&T approval by March 30, 2009.

January 9, 2009  CPDC submits to Presidents proposed revisions to the Draft Capital Improvement Program.

February 13, 2009  Campuses submit the Revised COBCPs for Draft COP & CIP.

March 30, 2009  Campuses submit the Final Capital Improvement Program (two paper copies and one electronic copy). Program should include:

• Final COBCPs with feasibility studies.
• Minor Capital Outlay.
• Capital Renewal project proposals.
• Final equipment lists.
• Project Justifications & Financial Plans for 2010/11 non-state programs.
• Approval of Housing Proposal Review Committee for 2010/11 housing programs.

March 30, 2009  Campuses submit master plan map and facility legend, campus photographs, captions and campus history.

March 30, 2009  Financing and Treasury approves campus final financial plan for projects to be funded by bonds, including auxiliary projects, for the Action Year.

May 2009  Board of Trustees approves the Draft 2010/11 COP & CIP.

June 1, 2009  CPDC submits final 2010/11 COBCPs and equipment lists to DOF.

Summer/Fall 2009  Campus SCOPE review meetings with State Agencies.

September 2009  Board of Trustees approves Final 2010/11 COP & CIP.

January 10, 2010  Governor's Budget for 2010/11 and multi-year infrastructure plan is released. DOF submits final COBCPs and equipment lists to LAO.

February 2010  Legislative Analyst's Office releases analysis of the 2010/11 budget.

March - May 2010  Legislative Committee hearings on the 2010/11 budget.

July 2010  Campuses complete design architect selections/agreements for projects included in the Governor's Budget.

November 2010  Ballot initiative to fund the 2010/11 and 2011/12 Capital Outlay Programs (pending legislative approval).
1. Introduction
   - Executive Summary
   - Purpose
   - General Project Description
   - Alternatives

2. Program Requirements
   - Existing Building's General Description
   - Building Deficiencies

3. Site/Master Planning Issues
   - Relationship to campus master plan
   - Geographic factors
   - Soil Conditions/Geotechnical Report and Site Survey
   - Utilities

4. Accessibility
   - Analysis of compliance with campus accessibility master plan
   - Accessible design elements (path of travel, seating distribution)

5. Building Considerations, Analysis & Description
   - Architectural
   - Electrical and Telecommunications
   - Exterior/Cladding
   - Hazmat
   - Height & Massing
   - Construction Phasing
   - Structural
   - Energy Use Projections/ AB32
   - Mechanical
   - Construction Phasing
   - Plumbing
   - Fire Protection
   - Sustainability Measures
   - Code compliance (Title 24, CBC, ADA)

6. Alternatives
   - Alternative approaches to meet program needs: alternative sites, orientation, phasing, scale, construction materials, joint use and secondary effects.

7. Project Cost Estimate
   - Cost estimate by Building Component
   - Cost comparison with alternatives
   - Analysis of variances from the CSU guidelines
   - Comparison of building systems life cycle cost analyses
   - Assumptions/Inclusions/Exclusions

8. Conceptual Project and Site Design Drawings

9. Program for Environmental Responsibility (PER) Project Summary
DETAILED PROJECT CONSIDERATIONS FOR NEW CONSTRUCTION

A. Program
1. Program space entitlements by discipline per COBCP.
2. Room summary with total ASF in each discipline and proposed use of total GSF.
3. Program requirements relative to electrical power/lighting/HVAC/central plant capacity/telecom/sustainability and specialized group I & II equipment.
4. Justify all requested space that exceed CSU space standards.

B. Building
1. Height and massing of building to determine the floor area ratio and visual impact.
2. Recommended structural system based on program requirements for spaces, flexibility and possible expansion.
4. Provide costs for two alternative exterior claddings. The type and approximate area of exterior cladding should be calculated for first cost and life cycle cost analysis.
5. Roofing material cost should be calculated for first cost and life cycle cost analysis.
6. Alternative HVAC systems should be determined and life cycle cost analyses should be performed.
7. Flat roofs should be evaluated to maximize the potential for photovoltaic systems.
   Mechanical equipment (excluding elevators) should be enclosed or accommodated within the building shell and considered in the life cycle cost.
8. An extra elevator should be evaluated, depending upon building height and function.
9. Geographical factors that may affect cost are to be considered, such as climate, topography, foliage, community interface and cost of construction in that area.
10. Identify specific sustainability design measures that will be incorporated into the building scope of the project. Use PER as a guide. Provide PER Project Summary.

C. Site
1. Location of utilities to be determined, including verification of utilities on- and off-site if required, with connections to utilities/central plant to be estimated for cost.
2. Additional estimated costs if utility relocation or major extension is required.
3. Other site information and constraints should be considered: size and shape of site, location of existing buildings, lay-down area, pedestrian detours and service access.
4. ADA site access improvements/path of travel plan. Required parking improvements.
5. Identify specific sustainability design measures that will be incorporated in the site work of the project. Indicate information using PER and Project Summary.

D. Construction
1. Contractor's access to site and lay-down area should be determined and cost estimated or allocated for the ease/difficulty of construction in general conditions.
2. Maintenance of Fire Department and pedestrian access on campus during construction should be determined and costs estimated or allocated.
3. Identify that there may be construction management tracking of sustainability measures.
4. Any other factors prompting a higher than average percent for general conditions should be addressed in a narrative, e.g., phasing, surge space, precedent activities.

E. Cost Estimate
1. Use the UniFormat Component Summary (CPDC form 2-7.5) to provide overall project cost data as derived from a supporting cost estimate. Include a copy of the cost estimate with CCCI noted.
2. Provide justification for any variations from the 2010/11 cost guide.
3. Design Contingency: Architects are directed to include a 15 percent design contingency in the feasibility study for projects of $3-30 million and a 10 percent contingency for larger projects.

DETAILED PROJECT CONSIDERATIONS FOR RENOVATIONS

A. Program
1. List existing building deficiencies based on the programmatic needs of academic or instructional support activities.
2. Identify the extent to which building occupants would be at risk for health, life and safety without systems upgrades, including seismic structural safety, and exiting.
3. Describe the extent to which renovations will address projected program needs, technology enhancements and capacity increases in the building.
4. Reference the campus Pacific Partners Study and document adverse effects due to lack of renovation of the existing building systems. Indicate previous actions taken by the campus to repair/upgrade.
5. Provide existing and proposed room summary with total ASF in each discipline/use.

B. Building
1. Indicate historical energy costs for this building and overall energy consumption.
2. For HVAC systems upgrades, identify alternate designs evaluated, projected energy and operational cost savings, and payback period including life cycle cost analysis.
3. Discuss coordination and phasing with other capital outlay projects.
4. Provide test results for hazardous materials in building structures, identify all proposed penetrations in internal and external walls and estimate abatement costs. Destructive/investigative testing should be completed as necessary.
5. Plumbing and other utilities should have conditions verified. Field investigation should include destructive/investigative testing and verification.
6. Electrical supply, transformer capacity and power distribution systems should be checked for adequacy. Identify laboratory and computer equipment power and cooling requirements.
7. Identify any special power management requirements (clean or uninterrupted power).
8. Identify if Seismic Code Division VI-R will be triggered by renovations exceeding 25 percent of building replacement cost.
9. Identify ADA requirements triggered by this renovation and related compliance costs (restrooms, signage, elevators, path of travel, door swings, door knobs, sprinklers, computer lab heights, equal access to each kind of work station, turn around space in labs). Include any reductions in capacity.
10. If construction is to be phased, describe how power and air are going to be supplied to the occupied parts of the building.
11. Identify specific sustainability design and construction measures that will be incorporated into the building and site of the project. Use PER as a guide. Provide PER Project Summary.

C. Construction
1. Contractor's access to site and lay-down area should be determined and cost estimated or allocated for the ease/difficulty of construction in general conditions.
2. Maintenance of Fire Department and pedestrian access on campus during construction should be determined and costs estimated or allocated.
3. Identify that there may be construction management tracking of sustainability measures.
4. Any other factors prompting a higher than average percent for general conditions should be addressed in a narrative, e.g., phasing, surge space, precedent activities.

D. Cost Estimate

1. Use the Component Summary (CPDC form 2-7.5) in UniFormat to provide overall project cost data as derived from a supporting cost estimate. Include a copy of the cost estimate as an attachment.

2. If appropriate, provide the cost benefit to the state for a phased versus complete renovation; include leasing costs for accommodating occupants temporarily and costs for extended general conditions and overhead to phase construction. Include impacts to the academic program.

3. Provide justification, with back up, for any variations from typical renovation costs at 65 percent of the 2010/11 cost guide.

4. Design Contingency: Architects are encouraged to include a 15 percent design contingency in the feasibility study for projects of $3-30 million and 10 percent for larger projects.

All feasibility studies should be reviewed by a Mechanical Review Board (MRB) member and Seismic Review Board (SRB) member, as applicable. There is no cost to the campus for feasibility reviews by the MRB. Information regarding the MRB can be accessed at: http://www.calstate.edu/CPDC/AE/mech_systems_review_agreements.shtml. Information regarding the SRB can be accessed at: http://www.calstate.edu/CPDC/AE/seismic_contracts.shtml.
CSU COST GUIDE FOR STATE AND NON-STATE FUNDED BUILDINGS
FIVE-YEAR CAPITAL IMPROVEMENT PROGRAM 2010/11 THROUGH 2014/15

CCCI: 5586 EPI: 2894

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<th>Type of Project</th>
<th>New Base Unit Cost per GSF w/ GC</th>
<th>New Base Unit Cost per GSF w/o GC*</th>
<th>Group I Equipment Cost (% of Bldg. Cost)</th>
<th>Group II Equipment Cost per ASF</th>
<th>Building Efficiency (%)</th>
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<tbody>
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<td><strong>State Buildings</strong></td>
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<td>Psychology - Dry Lab</td>
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<td>Auditorium (1200 seats)</td>
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<td>$149</td>
<td>4%</td>
<td>$14.27</td>
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</table>

Notes:
1. Site Work cost is per Feasibility Study or 3% of building costs.
2. Telecommunications instruments are included in Group II unit costs.
3. Conduit and risers are included in Building GSF unit costs.
4. Campus to perform feasibility study to justify costs above guidelines.

* For use with CM@Risk cost estimates.
CSU COST GUIDE FOR THE STATE AND NON-STATE FUNDED
FIVE-YEAR CAPITAL IMPROVEMENT PROGRAM 2010/11 THROUGH 2014/15

CCCI: 5586 EPI: 2894

<table>
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<tr>
<th>Type of Project</th>
<th>New Base Unit Cost per GSF</th>
<th>Group I Equipment Cost w/o GC* (% of Bldg. Cost)</th>
<th>Group II Equipment Cost</th>
<th>Building Efficiency</th>
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<tbody>
<tr>
<td><strong>Non-State</strong></td>
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<td>Activity-Recreation Center****</td>
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<td>$354</td>
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| Parking                          |                             |                                                 |                         |                     |
| Structure per Space****          | $15,046                     | $13,692                                         |                         |                     |
| Surface per Space                | $3,408                      | $3,102                                          |                         |                     |

Notes:
1. Site Work cost is per Feasibility Study or 3% of building costs.
2. Telecommunications instruments are included in Group II unit costs.
3. Conduit and risers are included in Building GSF unit costs.
4. Campus to perform feasibility study to justify costs above guidelines.

Footnotes:
* For use with CM@Risk cost estimates.
** Type 1 = Type III or V construction (Wood frame/light steel) 1-3 stories, no dining commons
*** Type 2 = Type I or II construction, multistory, typically with dining commons and other support space
**** Cost basis derived from composite of recent projects (2008)
MAJOR CAPITAL OUTLAY PROGRAM LIST OF SUBMITTALS
& ACCESSING ELECTRONIC FORMS

I. STATE FUNDED PROJECTS
Contents of the Capital Outlay Budget Change Proposals (COBCPs) for projects proposed in the five-year program should include the following information. ALL SUBMITTALS MUST USE THE ELECTRONIC FORMS CURRENTLY AVAILABLE ON THE CPDC WEBSITE. Several forms have been modified from previous versions; all CPDC forms now specify a revision date. The Chancellor's Office Facilities Planning Web page for 2010/11 COBCP forms is located at: http://www.calstate.edu/CPDC/

**Capital Outlay Program 2010/11**
- CPDC 1-4: COBCP Project Description
- CPDC 1-3: COBCP Project Summary Worksheet
- CPDC 1-2: Summary of Campus Capacity
- CPDC 2-1: Full-Time Equivalent Enrollment Distribution for Selected Years
- CPDC 2-2: Enrollment Distribution by Level and Category of Instruction
- CPDC 2-3: Calculation of Space Requirements for Instructional Projects
- CPDC 2-4: Summary of Space Requirements for a Building
- CPDC 2-6: Room Specifications (to be submitted prior to project funding)
- CPDC 2-7 Capital Outlay Estimate

Support documents for the 2-7:
- Feasibility Study (see Attachment 2 for guidelines)
- CPDC 2-8: Energy and Utilities Planning Checklist
- CPDC 2-8.5: Information Technology Planning Sheet
- CPDC 2-23: Equipment List
- CPDC 2-24: Adjustment of Group II Equipment Budget Request
- CPDC 2-7.5: Summary of Component Costs
- CPDC 2-9: Space Calculation for Library

An approved campus master plan map identifying project location
- CPDC 3-1: Project Area Summary (Required program specifications to be prepared for transmittal to CPDC and project architect after funding is included in the Governor's January Budget.)

Projects in Years 2 through 5
- CPDC 1-4: COBCP Project Description
- CPDC 2-7: Capital Outlay Estimate
- An approved campus master plan map identifying project location

II. NON-STATE FUNDED PROJECTS
Projects being proposed should include the following information:

**Required For All Projects**
- CPDC 1-4: COBCP Project Description
- CPDC 2-7 Capital Outlay Estimate
- **Project Justification** Statement for first year projects only (see requirements below for specific programs.)
- An approved campus master plan map identifying project location
• **Funding source**, i.e., program reserves, revenue bond sale, auxiliary organization funds, and donations. A preliminary ten-year financial plan projection (with two years of actuals) indicating proposed rate increases should be included for housing projects. Plans due to Financing and Treasury by October 31, 2008, for projects in the action year 2010/11.

**Justification Statements Required for 2010/11 Non-state Projects**

**Student Unions:**
- Verification of a successful student referendum for the project.
- A viable financial plan, for a ten-year projection with two years of actuals, including details of project financing which are consistent with and incorporate the standard annual student union budget plan. Draft financial plans must be submitted to Financing and Treasury by October 31, 2008.

**Parking:**
- A facility/parking spaces utilization/demand study by an independent consultant including factors pertaining to significant changes in enrollment, losses due to building construction, changes in mass transit patterns or community parking regulations. All parking facilities require a thorough access assessment be conducted by an independent consultant prior to submission.
- A financial plan comparing projected campus parking program revenues to expenses for a ten-year projection with two years of actuals. Draft financial plans must be submitted to Financing and Treasury by October 31, 2008.

**Housing:**
- A housing development plan including marketing surveys of the demand for on- and off-campus housing and rental rate surveys.
- A request for an evaluation of the proposed project by the Housing Proposal Review Committee. This meeting date should be between September 2008 and May 2009. See requirements for proposal to the HPRC at: [http://www.calstate.edu/FT/Hous/HPRCInfoProc.shtml](http://www.calstate.edu/FT/Hous/HPRCInfoProc.shtml).
- A financial plan comparing projected campus housing program revenues to expenses for a ten-year projection with two years of actuals. Draft financial plans must be submitted to Financing and Treasury by October 31, 2008.

**Health Center Projects:**
- A financial plan comparing projected campus health center facility fee revenues to expenses for a ten-year projection with two years of actuals. Draft financial plans must be submitted to Financing and Treasury by October 31, 2008.

**Donor Funded Projects:**
- Identification of sufficient cash on hand for the project to support the project phase(s) requested. Projected cash flows for the balance of funds for the remaining project phase(s). Draft financial plans must be submitted to Financing and Treasury by October 31, 2008.

**Projects Operated by Auxiliary Organizations:**
- If funded from cash, identification of sufficient cash on hand for the project to support the phase(s) requested, and plan for obtaining cash for future phases. If it is anticipated to be funded by issuance of debt, by either the Auxiliary Organization directly or through Systemwide Revenue Bonds, then a viable financial plan submitted with the information noted above. Draft financial plans must be submitted to Financing and Treasury by October 31, 2008.
Additional information for 2010/11 Projects:
- Confirm availability of required utilities/infrastructure. (Forms CPDC 2-8 and 2-8.5)
- A project calendar showing significant events and steps (i.e., Housing Proposal Review Committee, Schematics Presentation at the BOT, Projected Bid Dates).
- Identification of anticipated funding sources of projects, specifically: donor funds, grants, program reserves or financing.

III. ACCESSING ELECTRONIC FORMS

Campuses are requested to use forms with current revision dates to improve CPDC’s review process. All forms referenced in this call letter may be accessed via the CPDC page of the Chancellor’s Office web site: http://www.calstate.edu/CPDC/. From this page menu select Facilities Planning; Forms; select either Major Capital Outlay or Minor Capital Outlay to access the desired forms. For assistance contact Jarelle de Sais at (562) 951-4093.
CATEGORIES AND CRITERIA TO SET PRIORITIES

2010/11–2014/15 State Funded Five-Year Capital Improvement Program

General Criteria

A campus may submit a maximum of one project for the 2010/11 budget year, and one project for the 2011/12 planning year, including health and safety projects. A campus may submit a maximum of three projects per year, including health and safety projects, for the 2012/13 through 2014/15 planning years. Exceptions to this limit will be considered on an individual project basis. Equipment and seismic strengthening projects are excluded from this limit. Seismic strengthening projects will be prioritized according to recommendations from the CSU Seismic Review Board.

Campuses shall typically prepare their project requests for the five-year program using preliminary plan (P) phase funding separate from the working drawing and construction (WC) phases for new project starts. Approval of multi-phase projects may require the project funding to be allocated over more than one bond cycle. Campus requests for PWC lump sum funding will be considered on an individual project basis.

Current trustee-approved campus physical master plan enrollment ceilings apply to on-campus station count enrollment only. These numbers are to be used as the basis of comparison for justifying capital projects that address enrollment demand to be accommodated on campus. Enrollment estimates that exceed these figures should be accommodated through distributed learning and other off-campus instructional means. Proposed renovation projects are expected to include additional instructional capacity (a minimum of 10% increase in the building’s existing capacity) as a means to address enrollment demand in these types of projects. Projects that increase capacity will receive higher priority consideration than renovation projects without enrollment capacity increases. Priorities will be determined based upon the relative deficiency in campus space.

If there are two or more auditoriums or large lecture hall projects, priority shall be given to the project for which 50 percent or more of its funding will be from non-state sources. At least $5 million must be raised from non-state sources for an auditorium project.
Individual Categories and Criteria

I. Existing Facilities/Infrastructure

A. Critical Infrastructure Deficiencies

These funds correct structural, health and safety code deficiencies by addressing life safety problems and promoting code compliance in existing facilities. Projects include seismic strengthening, correcting building code deficiencies, and addressing regulatory changes which impact campus facilities or equipment. These funds also include minor capital outlay and capital renewal projects.

B. Modernization/Renovation

These funds make new and remodeled facilities operable by providing group II equipment, and replacing utility services and building systems to make facilities and the campus infrastructure operable. These funds also meet campus needs by modernizing existing facilities or constructing new replacement buildings in response to academic, support program needs and enrollment demand as appropriate.

II. New Facilities/Infrastructure

These funds eliminate instructional and support deficiencies, including new buildings and their group II equipment, additions, land acquisitions, and site development.